Integrated Travel Manager System Quick Start Guide

Logging into the Integrated Travel Manager System

1. There are two ways to access the Integrated Travel Manager software. One using the Client Server and the other using the Citrix Server. You can identify the method available to you by looking at your program menu. Click on the **Start** button and select **Programs**.

   a. To access the software via the Client Server, from your Programs menu select **TMV7.1C>TM V7.1C Doc Prep**. The Travel Manager login Screen will appear on the screen.

   b. To access the software via the Citrix Server–

   – From your Programs menu select **Citrix ICA Client** and then select **Citrix Program Neighborhood** from the drop-down list. This will open the **Citrix Program Neighborhood - Custom ICA Connections** window.

   – Double-click on the **TM71C via Citrix** icon. A warning message informing you that you are accessing a Department of Commerce computer system will appear on the screen.

   – Click **<OK>** to clear the message. The Travel Manager login Screen will appear on the screen.

   ✀ To use the shortcuts, click on the **TM V7.1C Doc Prep** or **TM71C via Citrix** icon on your desktop.

2. After reading the Travel Manager "Privacy Act Notice", click in the User ID field, enter your **TM UserID** and press **[TAB]**.

✍ Your TM UserID is the first three letters of your last name plus the last four digits of your Social Security Number

3. If logging into Travel Manager for the first time, enter the Travel Manager default password in the Password field and press **<OK>**.

✍ *Contact your servicing Finance Office for the Default Password.*

The system will instruct you to establish your own unique password and, if required, electronic signature using the following series of messages and data entry windows:

   a. A warning message *"New User - please enter a new password now."* will appear on the screen. Click **<OK>** to clear the prompt.

   b. The Set Password window will open. Type a unique password of your own in the Password field and press **[TAB]**.

   ✍ Passwords must have a minimum of eight positions, must include at least one number (1, 2, 3...), and are case sensitive.

   c. Type your unique password in the Verify Password field and click **<OK>**.

   d. A system message will appear on the screen. Normally, this message welcomes you to the Travel Manager software. However, this message can also contain information regarding upcoming changes to the software or inform you when your software has not been updated to the most current release. Click **<OK>** to clear the message.

   e. The Travel Manager main document preparation screen will open and another message, *"Your electronic signature is currently blank. Please enter a new electronic signature."* will appear on the screen. Click **<OK>** to clear the message.

✍ Your electronic signature is a personal identification code used to electronically stamp travel document(s).

   f. The Set Signature window will open. Type a unique electronic signature of your own in the New Signature PIN field and press **[TAB]**.

✍ Electronic signatures must have a minimum of eight positions, must include at least one number (1, 2, 3...), and are case sensitive.

✍ For internal security purposes your electronic signature should be different than your password

   g. Type your unique signature in the Verify New Signature PIN field and click **<OK>**.

4. If you have already established your own unique password, enter that password in the Password field and press **<OK>**.

5. You are now Logged into Travel Manager.

For assistance call the CAMS Travel Help Desk on 301 427-1009 and ask for "Travel Help".

The following procedure provides guidance on how to review and approve travel documents from the Review window in the Document Preparation Module. You have documents to review when the message, *"You have documents waiting your review and approval. Choose 'Review' from the File menu."* appears on the screen when logging into Travel Manager. Click **<OK>** to clear the message. To electronically review and stamp a document:

1. Click on **Review** from the File Pull-down menu**.**

2. A list of documents requiring your on-screen review and electronic signature will be displayed. The list will provide document type, document name, departure date, and traveler's name.

3. Highlight the document you want to electronically review and stamp and click **<OK>**. The document will open to the document main screen which allows you to access all the data entry windows for that specific document.

✍ *You can review the document by using the data entry windows, the Print Preview option on the File Menu, or by printing a paper copy of the document.*

a. To review a document from the data entry windows, click on the Itinerary, Ticketed Information, Expenses, Lodging & M&IE, Accounting, and Comments buttons and review the summarized data. Click either **<Close>** or **<OK>** to exit each window.

b. To review a travel document on screen, click **Print Preview** from the File pull-down menu. Use the navigation tools provided on the screen to review each page of the document. When finished reviewing the document, click the Close button to return to the main document screen.

c. To review a paper copy of the travel document, click **Print** from the File pull-down menu.

4. To electronically stamp a document SIGNED, REVIEWED, or APPROVED, click on the Document Status button. The Document Status window will open.

5. In the Status field, select the appropriate status (SIGNED, REVIEWED, or APPROVED) from the pull-down list.

6. In the Signature PIN field, type your electronic signature and press **<OK>**.

7. When applying an electronic stamp to a document, one or more of the following prompts may appear on the screen. These prompts will vary based on the document type and the stamp that is being applied.

a. If the prompt, *"You must save the document before checking funds. Would you like to save the document? (NOTE: Select YES to save the document now. Select NO to cancel stamping and funds checking.)"* Respond as appropriate, **"Yes"** or **"No".**

b. If the Save As window appears on the screen, verify that the file name is correct and click **<OK>**.

✍ *By default the travel document is saved using the authorization number as the name.*

c. When the Traveler applies the SIGNED stamp on a voucher, the prompt *"I certify that this voucher is true and correct to the best of my knowledge and belief, and that payment or credit has not been received by me. I hereby assign to the United States any right I may have against any parties in connection, with reimbursable transportation charges described above, purchased under cash payment procedure (41 CFR Part 301-10). I verify that I have all receipts necessary to support the claims in this voucher. Any exceptions are noted in the comments section.."* will appear on the screen. Click **<OK>** to acknowledge the message.

d. When applying the SIGNED or APPROVED stamp on a travel authorization or voucher, the prompt *"Funds Check in Progress.."* will appear on the screen. Click **<OK>** to clear the message. The system will then validate the Accounting Classification Code and perform a funds check.

e. When applying the APPROVED stamp on a travel voucher, the prompt *"I certify that I have reviewed the itinerary and the expenses on this voucher and have deemed them appropriate, reasonable and in support of mission requirements."* will appear on the screen. Click **<OK>** to acknowledge the message

f. When the prompt *"Save and Route current {Document type}? (Y/N)"* appears on the screen.. Select **"Y"** to continue the stamping and routing process and save the document.

✍ Selecting **"N"** **will** stop the saving process, however, the electronic stamp will still be applied. **Do not** save the document when prompted when exiting the document.

g. If the prompt, *"Have you made any adjustments to the current (document type}?"* may appear on the screen.

- Respond **Yes** to indicate that you have modified the contents of the document. The Adjustment for {document number} window will appear on the screen. Enter the reason for the adjustment in the Comments field and click **<OK>**. The Sign for Adjustment window will appear on the screen. Type your electronic signature in the Adjustment Signature PIN field and click **<OK>.**

- Respond **No** to indicate that no adjustments have been made.

h. If the prompt *"Email has been sent to {reviewing or approving official's name}."* Click **<OK>** to clear this message.

i. After stamping the document the system will return to a blank screen.